

Clinical Research Coordinator – Study Monitor Requests

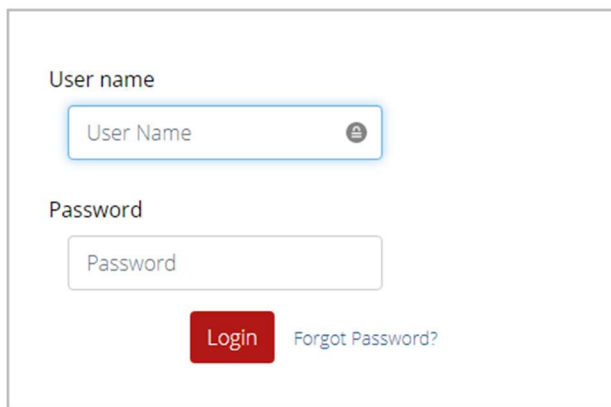
Notify COA Research Administration of a Study Monitor Needing Access 2

Release information to study monitors using EpicCare Link 4

Notify COA Research Administration of a Study Monitor Needing Access

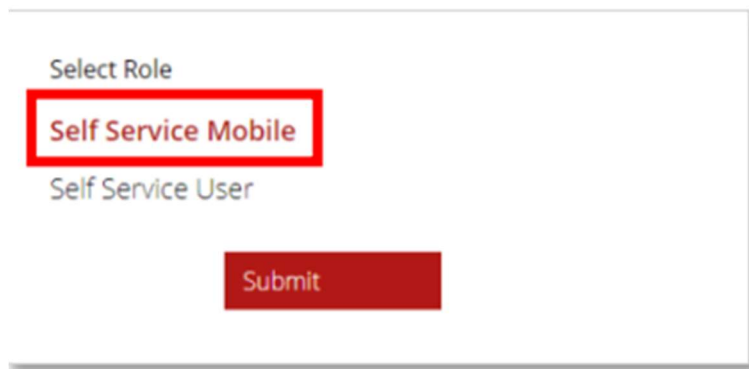
When you receive notice of an upcoming monitoring visit from a study monitor, you need to enter a request for the monitor to have access to the EpicCare Link web portal.

1. Open your web browser and access the portal: <https://coahelp.saasit.com>; or access via the Red Wagon.
2. Type in your CHS number and the account password, then click 'Login'.



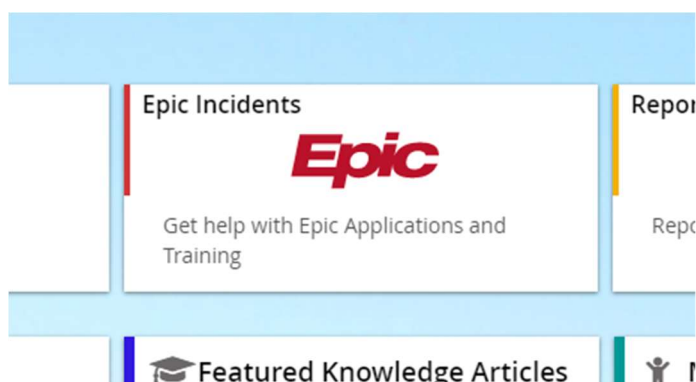
A login form with two input fields. The first field is labeled 'User name' and contains the placeholder text 'User Name' with a small eye icon to its right. The second field is labeled 'Password' and contains the placeholder text 'Password'. Below the password field is a red 'Login' button and a blue link labeled 'Forgot Password?'.

3. If you are asked to select a role, choose **Self Service Mobile**, and then **Submit**.



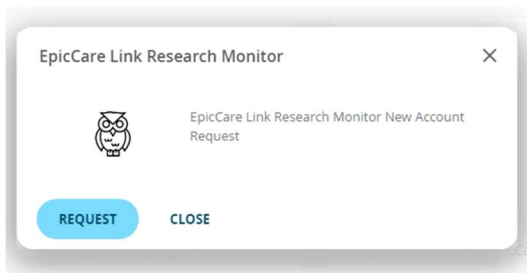
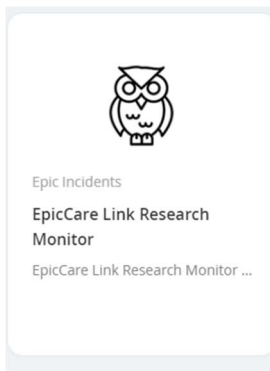
A 'Select Role' form with two radio button options. The first option is 'Self Service Mobile' and is highlighted with a red rectangular border. The second option is 'Self Service User'. Below the options is a red 'Submit' button.

4. After choosing Self Service Mobile, choose **Epic Incidents**.



A screenshot of the 'Epic Incidents' page. The page has a light blue header and footer. The main content area is white and features the 'Epic' logo in red. Below the logo, it says 'Get help with Epic Applications and Training'. To the right of the main content area, there are two links labeled 'Report' and 'Report' (partially visible). At the bottom of the page, there is a section titled 'Featured Knowledge Articles' with a graduation cap icon and a person icon.

5. Scroll down and choose **EpicCare Link Research Monitor**. Then click on **“Request”**.



6. A form will open. Please fill in the information on the form. **Fields with an asterisk are required fields.**

 **EpicCare Link Research Monitor**
EpicCare Link Research Monitor New Account Request

Service options

Name (Last, First): *

Work Email: *

Address: *

State: *

Country:

United States

Work Phone:

City: *

ZIP: *

County

Study Information

Sponsor Name:

Study ID: *

Study Contact Name: *

Study Contact Email: *

Other:

Comment

Comment

Comment:

Comment:

Save for Later

Review & Submit

Cancel

7. When you are finished, click on “**Review & Submit**” in the bottom left corner.
8. The request is submitted to Pam Barlow of the COA Research Administration Office for her to approve or decline.
9. You will be alerted by Pam Barlow via email that an account has been created.

Release information to study monitors using EpicCare Link

After study monitors receive access to the EpicCare Link web portal, you'll use reports to release information to them.

1. Run the Patients Associated with My Studies report from your Research Coordinator - My Studies dashboard.
2. Open the report results.
3. Select the patients whose records you want to release to the study monitor.
4. Click  **Release to Study Monitor** on the toolbar.
5. Select the study, patient group, and the dates the information should be available to the study monitor.
6. Click  **Release**.
 - You can view release information in the Study Monitor Release Information section of the Research Snapshot and in the Study Monitor Releases for My Studies component on the Research Coordinator - My Studies dashboard.

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